

2017 Consultant Services Proposals
Recommendation for Proposal Selection

Date: November 16, 2017

To: Chris Powell, Chair of the EERMC & all EERMC Council members

From: EERMC Consultant Services Evaluation Team

Subject: EERMC-2017-02 – Policy & Program Planning Consultant Services

The Evaluation Team (ET), comprised of Anthony Hubbard, Betsy Stubblefield Loucks, and Thomas Magliocchetti, three voting members of the Energy Efficiency and Resources Management Council (EERMC), reviewed the one (1) proposal received by the Energy Efficiency and Resource Management Council (EERMC) on October 5, 2017 for the subject EERMC-2017-02 – Policy & Program Planning Consultant Services. The valuation was based on the following criteria: 1. Overview and Work Plan (35 points), 2. Qualifications and Experience (25 Points), 3. Project Management and Organization (5 points), 4. ISBE proposal (6 points), 5. Interview Presentation Quality (10 points), and 6. Cost proposal (25 points).

Although only one proposal was received, the ET recognized that the kind of expertise required by the RFP is extremely specific. Therefore, the ET with consultation from the full council, decided against re-issuing the RFP since re-issuing was unlikely to result in additional responses. Furthermore, the ET did not feel a need to hold an interview with the offeror since the proposal is from the current EERMC consultant team who is already intimately acquainted with the Council and its needs. For this reason, the 10 points for Interview Presentation Quality were omitted in the scoresheets attached.

Based on the review of the proposal submitted, the ET believes that the Optimal Energy proposal offers all the components that are required by the RFP at a reasonable cost to the Council.

For more notes from the proposal review process please see the attached notes and scoresheets.

The ET recommends that the Council begin negotiations with Optimal Energy to establish a contract that reflects the submitted proposal. The contract should be limited to one (1) year from the contract start date with the option to renew on an annual basis for up to two (2) additional years. In total, if all extensions are used, the contract could last a total of three (3) years. The contract should begin on Jan 1, 2018.

Offeror	Total Points
Optimal Energy	87.33

Thank you,

Anthony Hubbard

Betsy Stubblefield Loucks

Thomas Magliocchetti

Proposal Scores

VENDOR	Total Average Technical Points (65 points)	ISBE Points (6 points)	Cost Points (25 points)	Interview Points (10 points)	TOTAL Points (106 points) (96 points without interview)
Optimal Energy	62.33	0.00	25.00	NA	87.33

Betsy's Scores								
VENDOR	Overview & Work Plan - 35 Points	Quals & Experience - 25 points	Project Mngmt & Organization - 5 Points	Total Technical Points - 65 Points	ISBE - 6 Points	Cost - 25 Points	Interview Presentation Quality - 10 Points	Total - 106 Points
Optimal Energy	35.00	25.00	5.00	65.00	0	25	NA	90.00

Anthony's Scores								
VENDOR	Overview & Work Plan - 35 Points	Quals & Experience - 25 points	Project Mngmt & Organization - 5 Points	Total Technical Points - 65 Points	ISBE - 6 Points	Cost - 25 Points	Interview Presentation Quality - 10 Points	Total - 106 Points
Optimal Energy	32.00	25.00	5.00	62.00	0	25	NA	87.00

Tom's Scores								
VENDOR	Overview & Work Plan - 35 Points	Quals & Experience - 25 points	Project Mngmt & Organization - 5 Points	Total Technical Points - 65 Points	ISBE - 6 Points	Cost - 25 Points	Interview Presentation Quality - 10 Points	Total - 106 Points
Optimal Energy	30.00	25.00	5.00	60.00	0	25	NA	85.00

Notes/Comments:

1. *Optimal Energy Proposal:* This proposal effectively addressed all the duties and responsibilities outlined in the RFP scope of work. Optimal Energy, having acted as the Council's consultant team for the past three years, has a record of providing excellent services and continues to demonstrate an intimate understanding of the Council's needs. The proposal presents an accurate timeline of activities, offers a team of experts with a clear organizational structure, and offers a total annual price that is approximately equal to past year costs. Moreover, the proposal estimates all tasks can be accomplished for slightly less than the RFP estimates 4,500 hours.